WISCONSIN DEPARTMENT OF HEALTH AND FAMILY SERVICES
Division of Health Care Financing
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To:	<u>Process Help Handbook</u> Users
From:	Jim Jones, Acting Director Bureau of Eligibility Management
Re:	**<u>Process Help</u> Release 05-04**
Release Date:	August 1, 2005
Effective Date:	August 1, 2005

<u>EFFECTIVE DATE</u> The following process additions or changes are <u>effective</u> **<u>08/01/05</u>**, unless otherwise noted. **Bold text in the new process section denotes new text. Text with a strike through it in the old process section denotes deleted text.**

<u>Changes</u>

1.1 Case Processing> Pre-Intake Processes> Receptionist Information	**<u>Old Process:</u>** The Receptionist is generally the first person to meet with the customer ~~entering a Job Center or W-2 agency~~. **<u>New Process:</u>** The Receptionist is generally the first person to meet with the customer.
1.2 Case Processing> Pre-Intake Processes> Request for Assistance (RFA)	A link was added to the Print CARES Application / Registration page in the System Help.
1.4 Case Processing> Pre-Intake Processes> Client Registration Instructions (CWW)	Links to the System Help were added throughout this page.
2.4 Case Processing> Intake> Clearance/ Master Customer Index (MCI)	Links to the System Help were added throughout this page.
2.5.2.2 Case Processing> Intake> Program Requests> Program Requests in AE> How to Process a Program Request	Links to the System Help were added throughout this page. Also, a statement was added to emphasize that a review driver should not be started when adding a program to a case. **<u>New Process:</u>** **Do not start a review just to add a new program and start a driver flow. Select the "Record New Group Level Program Request" option from the Case Summary page for your case. The CWW intelligence will start the Program Request Driver that will take you to the appropriate pages based on the data you enter.**
2.6 Case Processing> Intake>	Links to the System Help were added throughout this page.

Running Eligibility (CWW/ Mainframe Juncture)

3.1 Case Processing> Ongoing Case Maintenance> Newborn (Baby) Add	Links to the System Help were added throughout this page.
3.6.2 Case Processing> Ongoing Case Maintenance> View/Query History	Examples of Viewing History in the CWW were added.

4.1.3 Case Processing> Reviews> Review Driver Flow> Starting The Review Process

Links to the System Help were added throughout this page.

Also, a statement was added to emphasize that a review driver should not be started when adding a program to a case.

New Process:
Note: Do not start a review just to add a new program and start a driver flow. Select the "Record New Group Level Program Request" option from the Case Summary page for your case. The CWW intelligence will start the Program Request Driver that will take you to the appropriate pages based on the data you enter. See 2.5.2.2 for Adding a Program Request.

4.6 Case Processing> Reviews> Late Reviews	Links to the System Help were added throughout this page.
7.1 Case Processing> Companion Cases	This new section on Companion Cases was added.
16 Financial Processes> Income> …	Each of the chapters in this section on income was edited to include a link to the Dynalist instructions in the System Help.
31.2.2 Benefits> Benefit Issuance> FoodShare	This new section on Prorating a FoodShare Benefit Issuance was added.

57.4.3 Other> Driver Flows> CWW Driver Flows> Other Driver Flows> Begin Review

The Review Driver diagram was updated to reflect the new Begin Review Driver.

Old Process:

~~The Review page determines if the client is eligible for a face-to-face review or a non face-to-face review. After this page, the following pages will be scheduled in "Visit Again" status:~~

New Process:
Some of the non-financial summary pages will now be scheduled instead of detail pages in the Review Driver Flow. The intent of scheduling summary pages is to allow the worker to review the current information to assess whether or not any changes need to be recorded without having to go through the time consuming process of viewing each detailed record one by one. If a worker determines something needs to be changed, they may simply click on the "magnifying glass" icon to go to that particular detail record. The summary pages that will now be scheduled have been chosen to carefully balance the goals of workload savings and payment accuracy.

Review

The Review page records whether or not it is a face-to-face review. After this page, the following pages are always scheduled. In certain case configurations, some additional pages may be scheduled.

57.4.5 Other> Driver Flows> CWW Driver Flows> Other Driver Flows> Process a Program Request

A statement was added to emphasize that a review driver should not be started when adding a program to a case.

New Process:
Do not start a review just to add a new program and start a driver flow. Select the "Record New Group Level Program Request" option from the Case Summary page for your case. The CWW intelligence will start the Program Request Driver that will take you to the appropriate pages based on the data you enter.

57.4.6 Other> Driver Flows> CWW Driver Flows> Other Driver Flows> Six Month Reporting

The SMRF Driver diagram was updated to reflect the new SMRF Driver.

New Process:
Changes have been made to the SMRF Driver. The changes include: 1) The Case Information Summary page will be scheduled instead of the Household Members page. Please review the information for each individual on the Case Information Summary page to determine if a change is required. If a change needs to be made, click on the magnifying glass icon for that individual to go to the detail page. 2) The Shelter Cost and Utility Cost pages will no longer be scheduled as a part of the SMRF Driver flow. If changes are required on these pages, they will be either scheduled as a part of the address "mini-driver" flow when an address change is made on the General Case Information page, or the pages will have to be chosen from the Navigation Menu.